

2. Bank details for payments out or income

Please provide details of the bank/building society current account the income or payment is to be paid into. If you're making a payment to a third party, we'll need a certified copy of a bank statement for the third party account before payment can be made.

If the change(s) you're making affect your existing Direct Debit instructions and you've a regular investment in place, please complete a Direct Debit instruction for each of your products.

Name of bank/building society

Account name

Address

Branch sort code

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Account number

Postcode

Building society reference number

3. Regular investments

You should complete this section if you want to cancel or change a regular investment being made to your existing investment choice. If you want to start regular investments you should complete a new investment application for the appropriate product. The regular investment instructions on this application will replace any previous instruction.

Investor regular investment

Cancel my existing investor regular investment
or

Change my existing investor regular investment

£ (net*)

All regular investments will be paid monthly.
or for ISA only

Maximum allowed for remainder of this tax year

Do you want to increase your regular payments each year? Please select one option.

No

Yes - by the Retail Price Index (RPI)

Employer regular investment (pension plan only)

Please make sure that your employer completes a Record of payments due form for any changes to an individual SIPP.

Cancel my existing investor regular investment

Third party regular investment (pension plan only)

Cancel my existing investor regular investment
or

or

Change my existing investor regular investment

£ (net*)

All regular investments will be paid monthly.

Do you want to increase your regular payments each year? Please select one option

No

Yes - by the Retail Price Index (RPI)

* For the pension plan, we'll reclaim the basic tax rate on this amount, which will be invested in accordance with the Aegon Terms and Conditions.

4. Regular withdrawals

You should complete this section if you'd like to start regular withdrawals or change an existing regular withdrawal instruction. Withdrawals from the pension plan must be made using the Benefits crystallisation event form.

Amount* (to a maximum of 10% each year of wrapper value)

£

or

%

(calculated as a monetary amount at the time of processing this application)

Withdrawal frequency

Monthly Half yearly
 Quarterly Annually

Payment date

9th 18th 27th

Your withdrawal will be paid out of your product on the day selected and will take approximately three additional business days to clear into your chosen account.

Start date**

Do you want to increase your regular withdrawals? Please select one option.

No increase
 Increase by the Retail Prices Index (RPI)

Increase by a fixed % (1%-5% each year)

%

* Regular withdrawals have the option for fixed amount or % but not both.

** The start month can't be more than 12 months from the date of application.

5. Change of adviser charge

This instruction will replace your existing instruction for this product. This can be a monetary amount or a percentage based on the value of the top up contribution. The percentage is based on the value of your product wrapper.

Ongoing adviser charge*

£

or

% each year

* To be agreed by you and your adviser

How often do you want to pay the ongoing adviser charge? Please select one option.

Monthly
 Quarterly

6. Customer declaration

To the best of my knowledge and belief the information I've supplied in this form is true and complete.

You should sign and date this form by typing your full name in the signature box below and typing the date in the date boxes or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature box will be your signature. When you sign the form, by typing your name in this box or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Date

Print name

Signature (type name here)

If you have a joint plan (only available for Aegon Retirement Choices GIA investors) please provide signatures of all investors.

Date

Print name

Signature (type name here)

Date

Print name

Signature (type name here)

Date

Print name

Signature (type name here)

